CLIC Tool – Guidelines for Implementation

This document is meant to provide an overview of the general roles and tasks involved with the application of the CLIC Tool. It will help to orient your team to the process, outlining typical expectations in terms of actions required to complete the analysis and anticipated timelines to complete the analysis. This document is based on previous experience and feedback from communities that have applied the Tool across British Columbia.

Timelines

Timelines presented are approximate as the time required will vary. Staff capacity has the greatest influence on the timeline. Though it is possible to complete an analysis in as little as 4–6 weeks, extended periods (6 months or more) are possible if staff capacity is limited.

Staff

Given the need to gather data from multiple departments, it is recommended that a point person take a leadership role as the *Process Champion* to lead the implementation of the Tool. This Champion will necessarily require support from a *Core Team* responsible for collecting and providing relevant data from their respective department. Typically, a minimum of 3 staff are required to form this Core Team; with representation from Engineering, Finance, and Planning departments. These staff are likely to have access to detailed data on infrastructure costs and design details, development characteristics, and revenues that are critical inputs to the analysis. Additionally, an *Executive Sponsor* is also recommended to provide support, assign resources, and given the potentially sensitive nature of the results of this process, their review is typically required before results can be published or shared. It is possible that this role may consist of more than one person and include the CFO, CAO or any other senior staff or Council member.

CLIC Tool Implementation – Roles and Responsibilities

Party	Process Champion	Core Team	Executive Sponsor	External Advisor [Optional] additional cost
Role	Serves to manage the process and as a coordinator for Core Team staff (planners, engineers, finance, etc.). *If an external advisor is used, the Champion would serve as the key contact to manage their efforts.*	This team includes the Process Champion, as well as other key staff including planners, engineers, finance staff, asset managers, or other relevant staff. The size of this team is at the discretion of the Process Champion.	Supports the project and Process Champion and ensures sufficient dedication of resources internally. Responsibilities may also include reviewing draft results and any materials prior to publication or issuance to any external parties.	To support use of the CLIC Tool, an external advisor may be beneficial. This advisor can provide help with initial setup, staff orientation, data collection, understanding terminology, data entry and validation, as well as in the analysis and interpretation of results. They may also help with presentations to Council or the Executive Sponsor.
Responsibilities	• Review the Tool and all guidance materials • Identify and define scenarios for analysis • Brief Core Team on expectations and requirements • Coordinate and oversee the data collection process by the Core Team • Provide quality control of data inputs and worksheet completion • Enter data into the Tool • Review, finalize, and interpret results • Provide updates and information to the Executive Sponsor	• Gather, assess, and document data inputs for use in the Tool • Issue questions and clarifications to the Process Champion for review	• Confirm direction and support for implementation of the Tool • Attend required meetings and provide feedback • Support Process Champion if additional resources are required • Review and vet draft and final materials prior to publication (if relevant)	*An advisor can typically assume the following responsibilities:* • Orient project team at project outset, defining deliverables, expectations, and timelines. • Provide guidance on required data inputs and interpretation of requirements • Review materials and provide a quality check • Assist with interpretation of results and troubleshoot problems • Present results to Council and/or Executive Sponsor

CLIC Tool – Implementation Process

PHASE		MILESTONE	PARTICIPANTS	TASKS
1–2 WEEKS	**Initiation**	**Champion Orientation**	🟡	☐ Champion to review guidance materials and data and process requirements
		Executive Sponsor Orientation	⚫ 🟡	☐ Champion to brief Executive Sponsor on review process, timeline, capacity, and resource requirements
1–2 WEEKS	**Scenario Definition**	**Champion Preparation**	🟡	☐ Champion to define scenarios that will be analyzed
				☐ Champion to identify Core Team members and determine data collection responsibilities
				☐ Champion to prepare agenda and background materials to support Core Team Orientation
3–4 WEEKS	**Data Mining**	**Core Team Orientation Session**	🔵 🟡	☐ Champion introduces Core Team to the purpose, process, and scenarios that will be analyzed
				☐ Champion to determine timeline with Core Team based on capacity and resources required
				☐ Core Team data collection and compilation overseen by Champion
				☐ Champion to identify gaps and support Core Team in locating and vetting data
		Core Team Check-in Session #1	🔵 🟡	☐ Meeting to review progress to date and address data collection questions
				☐ Core Team data collection and compilation overseen by Champion
				☐ Champion to identify gaps and support Core Team in locating and vetting data
		Champion Check-in Session #2	🔵 🟡	☐ Meeting to review progress to date and address data collection questions
		Finalize Data	🟡	☐ Champion to review all data collected for accuracy and completeness
3–4 WEEKS	**Results Validation**	**Draft Results**	🟡	☐ Champion inputs data into the Tool and troubleshoots preliminary results
		Core Team Draft Results	🔵 🟡	☐ Champion reviews draft results with the Core Team to identify any outstanding issues and ot outline any additional data requirements
		Executive Sponsor Draft Results	⚫ 🟡	☐ Champion presents draft results to the Executive Sponsor
		Final Results	⚫ 🟡	☐ Champion to complete any data revisions, finalize results, and interpret findings

⚫ Local Government Executive Sponsor 🔵 Local Government Core Team 🟡 Local Government Champion